

Evaluation and ROI in Lloyds TSB

Interview in July 2007 with Steve Mapp, Senior Manager, Learning and Quality at Lloyds TSB plc

“It may not be easy, but it’s important” - that’s how Steve Mapp, Senior Manager, Learning and Quality at Lloyds TSB sums up his experience of evaluation and the ROI Institute methodology. “In an organisation like ours where we invest significant amounts in Learning & Development, we need to understand the impact of that investment.”

Steve and his colleagues, having used the American Society for Training and Development for research, had come across Jack Phillips, founder and chairman of the ROI Institute. Lloyds TSB was already using Kirkpatrick’s four-level model as a framework for measuring training impact and Jack Phillips’ ROI methodology was viewed as a natural progression. According to Steve, the Phillips methodology was valuable not just for the fifth, monetary, level of evaluation but also for the metrics and templates that help practitioners with the evaluation process.

Three years ago, desk research led Steve to abdi, the UK representative of the ROI Institute. In 2005, Steve sent two pathfinders on abdi’s certification workshops and more staff have followed since. In April this year, Jane Massy, abdi’s CEO, contributed to the launch of a series of network events for Lloyds’ L&D professionals. In June, Lloyds TSB also hosted the first annual UK ROI Institute masterclass, where Jack Phillips and Jane Massy demonstrated the use of scorecards for global reporting of L&D investment impact.

Working out of the Group’s Talent and Learning Directorate, Steve is leading work to develop frameworks and standards to enhance the efficiency and effectiveness of L & D — including evaluation and measurement. In the past two years he has been involved in a number of major initiatives including implementing a performance and learning management system. Measurement remains high on the agenda with a clear mandate from the Governance Group to drive higher level evaluation.

Steve admits that having a framework is only one important element. While technology certainly helps with data capture, Steve maintains that “we must create an environment where line managers are motivated to follow up on training interventions and make sure that it translates into business results.” This follow-up then provides the vital data for measuring training outcomes. Increases in motivation can be achieved by highlighting the link between the line manager involvement and training success. In Lloyds TSB work is under way to improve communication to line managers about this issue through presentations and by embedding tools in the learning materials themselves.

Steve’s goal is to see that 90% to 100% of training is evaluated at level 1, and 5% to 10% at level 5. By the end of this year, he expects at least a couple of level 5 evaluations to be complete. Steve plans to raise the capability of L&D professionals to use the ROI methodology across Lloyds TSB, using a structured needs-based approach.

Asked about the challenges of embedding the methodology, Steve cites the balance that has to be maintained between robust results and speed. Sometimes the business cannot afford to wait a year to find out the full impact of a new training product. The solution is to make use of forecasting — taking time upfront to work out the likely impact of properly implemented training, then tracking performance against the forecast and making appropriate adjustments.

(+44) (0) 1223 360240 (office) • **info@abdi.eu.com**

All correspondence: 4 Newmarket Road, Cambridge CB5 8DT